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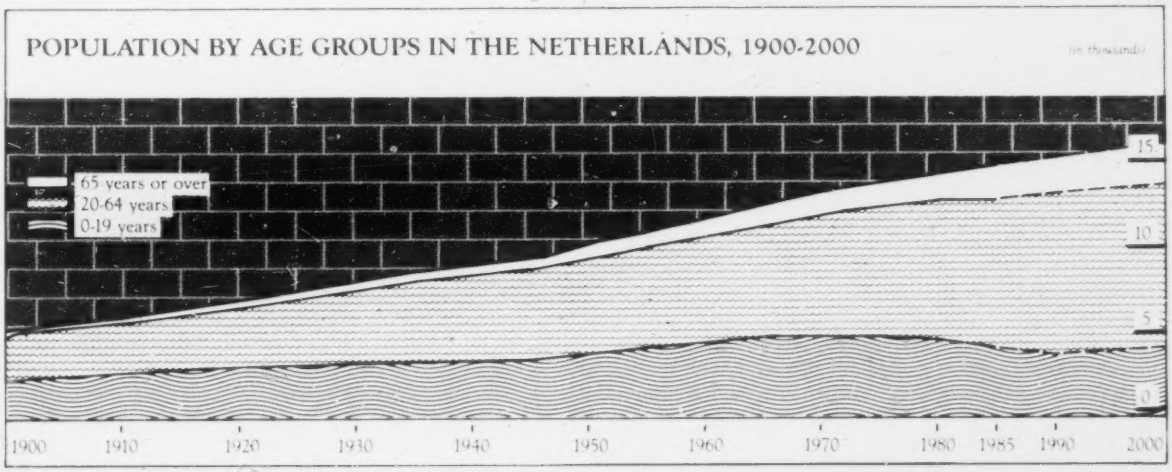
INTERNATIONAL DEMOGRAPHICS

CONSUMER TRENDS AND MARKETS ABROAD

DECEMBER 1985 VOLUME 4, NUMBER 12



COUNTRY PROFILE

THE NETHERLANDS

The saying, "One Dutchman is a philosophy, two is a club, three is a political party, or a religious denomination," aptly characterizes the Dutch as rugged individualists. The ease with which such rugged individuals coexist with one of the world's most elaborate welfare systems, supported by tax rates that Americans might consider extortive, is one of the Netherlands' apparent contradictions.

The Dutch proudly refer to themselves as the world's most cooperative individualists. Another contradiction is the fact that one of the world's most densely populated countries (1,098 inhabitants per square mile in 1984) is also the second largest net exporter of agricultural products, preceded only by the United States.

As a small, mineral-poor country with a seafaring tradition, the Netherlands survives on foreign trade. In 1983, total export earnings amounted to nearly 62 percent of the entire national income. Over 72 percent of Dutch exports go to other member countries of the European Economic Community (EEC), but imports are more diversified, with 47 percent originating outside the EEC. The U.S. supplies 9 percent of all Dutch imports, making it the fourth largest supplier, after West Germany, Belgium, and Luxembourg. The Netherlands' main export markets — West Germany, Belgium, Luxembourg, and France — accounted for $35.9 billion out of a total of $65.6 billion in 1983. Holland is the seventh largest U.S. export market.

Take the name "Netherlands" or "Low Countries" literally. Half the country, containing 60 percent of its population, is below sea level, protected by a range of dunes and dikes. Higher elevations lie only in the south and east, with the highest point of the country, on the border with Belgium and West Germany, rising to a modest 1,053 feet. Consequently, struggling with the sea recurs throughout Dutch history.

Even before this century, some 450 square miles of marshes and lakes, the so-called polders, had been reclaimed. A reclamation project undertaken during the 1930s — the closing of the former Zuiderzee (Southern Sea, now called IJsselmeer, or Lake IJssel) — made it possible to recover substantial stretches of agricultural and recrea-

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THIS MONTH: NETHERLANDS

PROVINCES OF THE NETHERLANDS: POPULATION, HOUSEHOLDS, DENSITY, AND ANNUAL GROWITH RATE

	Population in 1984	Households in 1984*	Population Density in 1984	Annual Growth Rate 1983-84
1. Groningen	561,500	216,000	621.3/sqm.	0.1%
2. Friesland	597,200	210,300	463.4	0.3
3. Drenthe	427,300	147,300	416.8	0.6
4. Overijssel	1,042,100	348,500	706.8	0.4
5. Gelderland	1,735,800	604,800	898.3	0.5
6. Utrecht	929,400	341,700	1,807.0	0.7
7. Noord-Holland	2,307,400	904,900	2,239.4	0.0
8. Zuid-Holland	3,139,200	1,189,100	2,796.0	0.3
9. Zeeland	355,500	130,200	515.2	0.2
10. Noord-Brabant	2,103,000	703,300	1,097.7	0.4
11. Limburg	1,083,600	378,900	1,291.9	0.3
12. Almere**	33,000	NA	577.3	***
13. Dronten**	22,200	NA	173.5	3.3
14. Lelystad**	55,100	NA	528.1	5.4
15. Zeewolde	800	NA	10.4	***
Total	14,394,600	5,215,400	1,097.7	0.4

* Projected from 1981 data.
** Centrally administered territories.
***Administrative divisions not in existence in 1983.
Source: Central Bureau voor de Statistiek, Statistisch Zakboek, 1984; Huishouden, 1981.

tional land. Four polders, with a total area of 637 square miles, have been pumped dry since the Zuiderzee was sealed off; whether a fifth should follow is still under discussion. A more recent project, the Delta Plan, started in the aftermath of the great flood of 1953 and to be completed by 1986, aims at shortening and reinforcing the vulnerable southwestern coastline.

Since 1848, the Netherlands has been a constitutional monarchy with a parliamentary form of government. As such, it is one of the most stable democracies in the world. The present queen, Beatrix, assumed her largely ceremonial position in 1980. Actual political power rests with the prime minister and his Council of Ministers which is nominated by the queen, but responds to the Parliament. Although the Netherlands is notorious for its proliferation of small parties, three parties — the Social Democrats (PvdA), Christian Democrats (CDA), and Conservatives (VVD) — dominate the political scene. The present government, elected in 1982, is a coalition of Conservatives and Christian Democrats, under the leadership of Prime Minister Ruud Lubbers (CDA).

CITIES AND REGIONS

With a total land area of 14,580 square miles, the Netherlands just slightly surpasses Massachusetts, Connecticut, and Rhode Island taken together. The main administrative units are the 11 provinces, of which Noord-Holland and Zuid-Holland are the most populous and economically most important — one reason the name "Holland" is identified with the country as a whole. In addition, four centrally administered territories are located in the Flevoland polders.

Below the provincial level, the country is divided into administrative units of different sizes serving different purposes. The largest are the 40 regional divisions or COROP areas; the smallest are the 749 *gemeenten* or communities, each headed by a *burgomaster*, or mayor, appointed by the queen. Although Amsterdam is the capital, the Parliament and Ministries are located in The Hague. The queen lives in Soestdijk, near Utrecht.

Amsterdam remains the commercial center of the country, but its role as the principal port city has been taken over by Rotterdam, which is also the focal point of the country's main industrial complex and the world's principal spot market for oil products. The area to the west of the city, the so-called Europort complex, houses many petrochemical industries. Other industrial centers of some importance are Zaandam and Ijmuiden, to the north and west of Amsterdam; the city of Eindhoven in Noord-Brabant, the home of the Philips Electronics Corporation; the former coal mining area in the south of Limburg; and the Twente area in the eastern part of Overijssel. The northern province of Groningen is economically important for its production of natural gas, at present the most important element in the country's energy balance, supplying 46 percent of the Netherlands' energy needs in 1981.

Although no community has more than 700,000 inhabitants, the country as a whole is highly urbanized because of the large number of medium-sized cities, especially in the west. The half circle that stretches from Utrecht and Hilversum to Amsterdam, Zaandam, Haarlem, IJmuiden, and then south to Delft, The Hague, Schiedam, Rotterdam, and Dordrecht is virtually one large conurbation, known as the "Randstad Holland," or roughly translated "Fringe-City Holland." After London, Paris, and the German Rhine-Ruhr area, it is the fourth largest continuous urban area in Western Europe. Once it was expected to engulf all of Zuid-Holland, as well as parts of Noord-Holland and Utrecht, but with the help of spatial planning and a slower population growth, this encroachment has not materialized.

The province of Zuid-Holland still maintains a central core of pastures, casually known as "the green heart of Holland." Nevertheless, the penetration of urban infrastructure and life styles in the rural areas is intense. Dutch statistical sources therefore distinguish between rural communities,

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which numbered 218 in 1984 and contained 12 percent of the population; urbanized rural communities, which numbered 414, with 37 percent of the population; and urban communities, which numbered 117, with 51 percent of the population. Distinctions are made on the basis of number of inhabitants, economic function, and economic activity of the population. Urbanized rural communities, for instance, are those with less than 30,000 inhabitants, less than 20 percent of their male labor force in agriculture, and no specific urban functions. In 118 of these communities, at least 30 percent of workers commute to their workplace.

POPULATION GROWTH

Partly because the Dutch are generally uncomfortable with large centralized personal data bases, the Netherlands has not published a complete population census in recent years. Paradoxically, however, it is one of the countries where population data are most complete and up-to-date, thanks to the continuous registration system. At birth or immigration, basic statistical data for each resident is recorded and kept on file at the city hall of the resident's community. When changing residence, Dutchmen are required to notify the city hall, so that their registration cards can be updated or transferred.

In 1983, the Netherlands counted 14.34 million inhabitants, compared to 5.10 million at the turn of the century, an average annual growth rate of about 1.2 percent. Although fairly low by U.S. standards, this growth rate surpasses those of surrounding countries due to Dutch fertility having remained fairly high until the mid-1960s.

In 1965, the total fertility rate (the mean number of live births up to the end of a woman's reproductive period) was 3.0, higher than anywhere else in the EEC, with the exception of Ireland. This distinction is sometimes attributed to the presence of a substantial Catholic minority in the south of the country. As in many other developed countries, women bear children quite late, with a mean age at first childbirth of almost 26 years. Since the 1960s the birth rate has dropped sharply to 11.3 per 1,000 in 1983 and Dutch fertility is now one of the lowest in Europe.

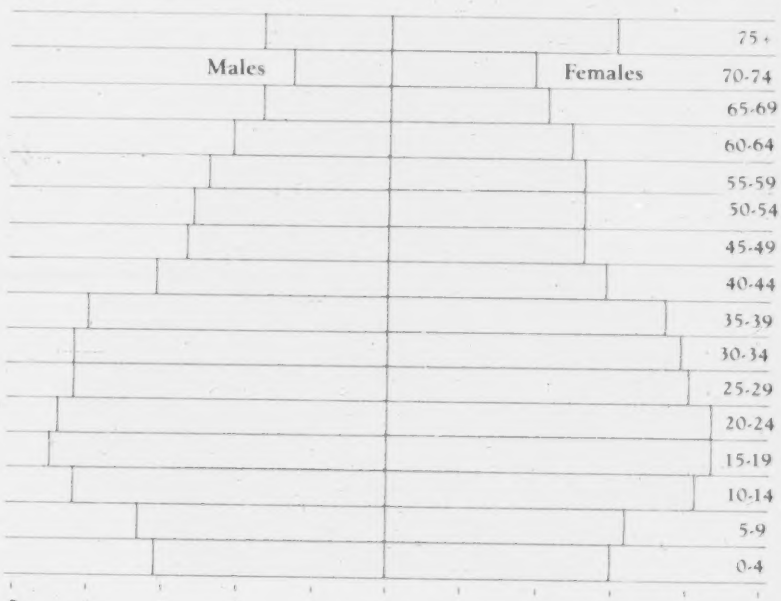
Meanwhile, the death rate has virtually stabilized at 8 per 1,000. The Dutch life expectancy, which was about 65 years in 1930, now stands at 72.7 years for men and 79.4 for women (1983), about 1.5 years higher than in the United States. Much of the improvement stems from the reduction of infant mortality to 8.3 per 1,000 live births. Women have shown greater gains in life expectancy than men with the result that the percentage of widows, which rose from nearly 7 percent of women in 1965 to nearly 9 percent in 1983, is expected to reach nearly 10 percent by the year 2000.

Natural increase has already dropped to a mere 0.4 percent a year. With emigration fairly stable at 4 to 5 per 1,000 since 1975, and an immigration rate that diminished from 9 per 1,000 in 1975 to 5 in 1983, the total growth rate in 1983 also fell to 0.4 percent.

Apart from the slight impact of net immigration, the positive growth rate reflects the large proportion (53 percent) of the population in its reproductive years. But like other developed countries, women are bearing fewer children and having them later in life. The mean age for the birth of a first

POPULATION OF THE NETHERLANDS BY AGE AND SEX: 1983

(in percent)



Age	Total	Males	Females
All Ages	14,339,551	7,102,598	7,236,953
0-4	883,494	451,663	431,831
5-9	927,452	474,453	452,999
10-14	1,192,172	609,272	582,900
15-19	1,249,642	639,820	609,822
20-24	1,242,438	632,498	609,940
25-29	1,173,392	598,028	575,364
30-34	1,158,992	595,539	563,453
35-39	1,101,954	568,694	533,260
40-44	854,417	441,089	413,328
45-49	768,105	391,297	376,808
50-54	751,424	373,702	377,722
55-59	707,330	340,816	366,514
60-64	640,625	300,592	340,033
65-69	544,355	244,784	299,571
70-74	458,070	191,705	266,365
75+	685,689	248,646	437,043

Source: Centraal Bureau voor de Statistiek, Statistisch Zakboek, 1984

child is almost 26 years. The Netherlands' long-term population trend is one of decline, with a total fertility of 1.45 in 1983, the fourth lowest in the EEC. According to the current medium variant calculated by the Central Bureau of Statistics (CBS), the Dutch population is expected to reach 15 million by 1990 and peak at slightly less than 16 million around the year 2005, after which it will slowly begin to decrease.

Although regional differences are not pronounced, some should be noted. After having been a net recipient of internal migration until the 1960s, the "Randstad Holland" is now losing population. The growth of Noord-Holland and Zuid-Holland has all but stopped. Of the 10 largest cities, only Groningen and Enschede have grown in recent years. Population losses are particularly marked in Amsterdam, which now loses about 2 percent of its population a year, primarily among families with small children, who are looking for a better quality of life.

At the same time, the cities attract young adults. Already, the age structure of the cities with over 100,000 inhabitants is biased towards the 20-to-29 and over-55 age groups, which account for 19 and 26 percent of their population, respectively, compared to 16 and 20 percent in the rest of the country. The 0-to-19 age group is rather underrepresented, with 24 percent of the population, against 32 percent in the rest of the country. In the near future, the highest growth rates are expected in the provinces of Friesland, Zeeland, and Noord-Brabant, stimulated in part by a government-sponsored decentralization policy.

HOUSEHOLDS AND FAMILIES

Both in terms of its median age (32 years in 1983) and its percentage of elderly (nearly 12 percent, expected to rise to 14 percent by the year 2000), the Dutch age structure is similar to that of the United States. It is, however, younger than the age structure of some neighboring countries, such as West Germany. Due to the recent drop in the birthrate, over a third of the population is now between 15 and 34 years old, whereas children under age 10 make up only 13 percent of the total.

As in other industrialized countries, household size in the Netherlands has been declining for some time, from a mean of 3.6 in 1960 and 3.2 in 1970 to 2.6 in 1983. A declining birthrate, increasing numbers of households, growing numbers of the elderly and the divorced, and especially the greater independence of young people all contribute to this trend. The percentage of one person households increased from 12 percent in 1960 and 17 percent in 1970 to 32 percent in 1983. The rise is observed in all age groups, but particularly among those under age 35 and over 75. At the same time, non-family types of households are gaining importance, from 3 percent in 1960 to 5.6 percent in 1981.

□

"ALREADY THE AGE STRUCTURE OF CITIES WITH OVER 100,000 PEOPLE IS BIASED TOWARD THE 20-TO-29 AND OVER-55 AGE GROUPS."

□

Mean household sizes in the 11 provinces vary from 2.5 in Noord-Holland (in 1981) to nearly 3 in Overijssel and Noord-Brabant, whereas the proportion of one-person households ranges from 16 percent in Drenthe and 17 percent in the somewhat traditionalist southern provinces of Limburg and Noord-Brabant to 27 percent in Noord-Holland and 28 percent in Groningen. The largest cities, particularly those with an important student population, tend towards small households. Forty-five percent of Groningen households, for example, are one-person households. Amsterdam has 39 percent of its households with only a single member.

Despite a relative surplus of young adults, the Dutch marriage rate fell from 9.5 per 1,000 inhabitants in 1970 to 5.5 in 1983. Young couples — especially those who are highly educated, leftist in political orientation, and who live to the west and north — choose increasingly to live together without being formally married. Informal unions are less common among youth with strong religious convictions. The percentage of married men aged 25 to 29 dropped from 73 percent in 1970 to 56 percent in 1983; for women, the decline was from 84 percent to 71 percent. A 1982 survey showed that about 18 percent of female 22-to-23-year-olds lived in some kind of informal union. Marriage was more likely for older women. The proportion of women living with their legal husbands leveled off by age 30, at slightly over 80 percent.

After declining for some time, the mean age at first marriage has been rising slowly since the mid-1970s; in 1982, it was 26 years for men and 24 years for women. The CBS forecasts that the percentage of those reaching age 50 without ever having married will increase from 7 percent in 1980 to 11 percent by the year 2000. Divorces are becoming more common and many divorced persons do not remarry. Between 1970 and 1983, the percentage of divorces rose from 0.7 percent of all men and 1 percent of all women to 2.5 and 3 percent, respectively. By the year 2000, the numbers are expected to be nearly 5 and 6 percent. However, with a divorce rate of 2.3 per 1,000 inhabitants, the Netherlands maintains more marital stability than the United States, where the rate was 5 per 1,000 in 1982.

HOUSING, CONSTRUCTION, AND SPATIAL PLANNING

Only 26 percent of Dutchmen own their own homes as compared to 34 percent of West Germans, 35 percent of Swedes, 46 percent of Frenchmen, and 46 percent of Englishmen. Typically, Dutch families rent their homes often from government or quasi-government agencies. With no shortage of family homes at present, the declining birthrate makes future housing crunches unlikely.

The trend towards new living arrangements has, however, created a demand for small living quarters to accommodate special groups, such as unmarried adolescents, the elderly, and the growing number of divorced and other single adults. The bleak apartment buildings at the edges of the large cities provide needed physical space, but stand mute to the demand for present living environments. Finally, the largest cities, especially Amsterdam, are losing families and attracting young people, requiring a reformulation of housing priorities. In areas lacking sufficient low-cost housing for young people, empty buildings are often illegally occupied by groups of squatters, or krakers. Official attempts

AT A GLANCE: THE NETHERLANDS

Fastest Growing Cities

Groningen
Enschede

Most Populous Provinces

Noord-Holland
Zuid-Holland

Fastest Growing Provinces

Friesland
Zeeland
Noord-Brabant

THE NETHERLANDS

Smallest Household Size (Cities)

Groningen
Amsterdam

Largest Household Size (Provinces)

Noord-Holland
Overijssel
Noord-Brabant

Largest Cities

Amsterdam
Rotterdam
The Hague

PROVINCES

WEST
6. Utrecht
7. Noord-Holland
8. Zuid-Holland

SOUTHWEST
9. Zeeland

SOUTH
10. Noord-Brabant
11. Limburg

NORTH
1. Groningen
2. Friesland
3. Drenthe

EAST
4. Overijssel
5. Gelderland

CENTRALLY ADMINISTERED TERRITORIES
12. Almere
13. Dronten
14. Lelystad
15. Zeewolde

TIPS ON TRENDS

WHAT'S HAPPENING TO WINE DRINKING

While wine consumption per capita in most European countries and in the United States increased rapidly in the last 20 years, in three of the largest wine-producing countries — France, Italy, and Portugal — it decreased during the same period.

A report in *World Health Statistics* (Vol. 38, No. 2, 1985) discusses the data available on the consumption of wine, beer, and spirits. There are definite findings that problems with alcohol increase in a country as local production of alcohol increases.

In 1965 and 1980 — the two years for which data are compiled — Europe and North America accounted for two-thirds of the world's total production of alcohol. Growth in consumption in some developing countries is now more rapid than in developed countries, but part of the reason is that commercially produced beverages — especially beer — are just beginning to be made and distributed in these countries.

NOBLESSE OBLIGE . . .?

"Di is doing it." That's how some of the European continent's popular newspapers are headlining Britain's minor baby boom.

Nine months after the birth of Prince Henry to Princess Diana and Prince Charles of Britain's royal family — that is, by early last July — loyal subjects had produced 698 more babies than at the same time last year. At mid-year, 12,833 births had been recorded.

Some are not following the royal lead. Divorces in England and Wales were up 6 percent in 1984 to 179,000 according to government figures released in mid-August. A new law permitting divorce after one year of marriage is said to be partially responsible for the increase.

—Peter Inserra

to dislodge these occupants have led to occasional housing riots.

Considering the density of settlement, it is not surprising that spatial planning is a dominant concern in the Netherlands. Eight percent of Dutch soil is taken up by constructed area (1983), 9 percent by water, 12 percent by woods and wastelands, and 65 percent by agriculture. In Zuid-Holland, Noord-Holland, Utrecht, and Limburg, the proportion of constructed area exceeds 10 percent.

The State Service for Planning (RPD) offers advice and coordinates planning efforts of provinces and local governments. One of RPD's top priorities is to create a balance among business, industrial, residential, and recreational areas in the densely settled western section of the country. For this purpose, the new Zuidelijk Flevoland polder will primarily be used to create residential and recreational outlets for the Amsterdam area, rather than new agricultural land, as in earlier polder development projects. The polder city of Almere was planned as a satellite community for Amsterdam. A connecting railway is under construction.

ETHNICITY AND RELIGION

Although the Netherlands has both linguistic and religious minorities — the Frisian language in Friesland Province and Catholics in Noord-Brabant, Limburg, and parts of Zeeland, Gelderland, and Overijssel — the Netherlands has historically been a nation of little ethnic, religious, or cultural conflict. Frisian, a Germanic language leaning somewhat towards English, is taught in Friesland schools, next to Dutch, which is the official means of communication. Thirty-eight percent of the population is registered as Catholic, 22 percent as Dutch Reformed, 9 percent as Protestant, and 5 percent as belonging to other creeds. About 27 percent of the population has no religion.

Until recently, the Netherlands was characterized by its compartmentalized social structure. Catholics, Protestants, and even the socialists tended to have their own networks of social organization. For example, Protestants traditionally went to Protestant schools, were members of Protestant clubs and labor unions, read a Protestant newspaper, and bought in the stores of other Protestants.

Since World War II, the social structure has become more open. Nevertheless, the compartmentalization survives in certain aspects of everyday life. Some companies, such as the large C&A department stores, are known for giving preference to employees of a given religion. Schools at all levels continue to be organized along religious lines, even though religion as such may occupy only a minor part of their curriculum. The Free University at Amsterdam still maintains explicit, though somewhat weakened, links with the Protestant creed, whereas the Universities of Tilburg and Nijmegen reflect a distinct Catholic orientation.

Ethnically, Dutch society has diversified in recent years, due to the migration that followed the independence of Surinam, and especially the influx of "guestworkers." Since the 1960s, net immigration has greatly increased. Like several other European countries, the Netherlands opened its doors to temporary migrants from Southern Europe, Turkey, and North Africa to keep up a steady supply of low-paid unskilled labor. Although the policy has now been discontinued, some migration continues as foreign workers send for their families and settle permanently in the Netherlands. In 1983, the country counted 546,500 foreign nationals (about 4 percent of the population). This number does not include the roughly 140,000 immigrants who left Surinam before its independence in 1975 and who held Dutch citizenship. Although immigration from Surinam continued after 1975, it has declined since 1981 when an entry visa requirement for Surinamese citizens was adopted.

Due in part to a preference to remain in the Netherlands over returning home, the largest group of foreigners are the Turks (154,200 in 1983), followed by the Moroccans (101,500). Fewer workers were attracted from Spain, Portugal, and Yugoslavia, and many have now returned to their homelands. Finally, the Netherlands counts some 150,000 citizens from other EEC countries, especially West Germans (44,300) and British nationals (41,300). The number of U.S. citizens is small: 9,700 in 1983.

Although the percentage of foreigners in the Netherlands is lower than in West Germany, France, or Switzerland, the distinct religious and cultural

characteristics of some of these groups, together with sobering economic prospects, cause some social tensions. These tensions are aggravated by the disproportionate settlement of immigrants in the largest cities, often in specific neighborhoods. The size of the typical Moroccan family particularly (total fertility rate of 6.3 in 1982) does not adapt well to the small size of modern Dutch family housing. The danger of ghettoization is clearly present as, for example, in Amsterdam where blacks — now 6 percent of Amsterdam's total population — live largely in the suburb of Bijlmermeer.

EDUCATION

The central government finances education at all levels, making education and science the second largest budget item (19 percent), preceded only by welfare and social policy (22 percent). However, often private organizations with particular or philosophical objectives actually administer the schools.

Education until age 16 is compulsory and free. Thereafter, an annual tuition up to 500 guilders (about $150) may be charged. The Netherlands offers only one type of primary education, but at the secondary level offers four-year programs (LBO and NAVD), a five-year program (HAVD), and six-year programs (Atheneum and Gymnasium). Only students enrolled in six-year secondary schools can attend the universities. All other students can follow up high school by taking vocational or professional training.

Of the Netherlands' eight universities, the University of Leiden is the oldest and most traditional. Amsterdam is home to two universities while Groningen, Nijmegen, Utrecht, Rotterdam, and Maastricht host one each. Technical colleges are found in Delft, Enschede, Eindhoven (engineering), Wageningen (agriculture), and Tilburg (economics and social sciences).

As in other European countries, primary school enrollment in the Netherlands has declined in recent years, due to the drop in the birthrate. In 1975, the Netherlands' 9,453 primary schools educated 1.5 million students. By 1983, the number of schools had grown to 9,606, but the number of students fell to 1.2 million. A smaller decline, from 519,000 to 397,000, occurred among preschoolers. The 3,384 secondary schools, with their 1.5 million students, have only begun to face declining enrollments in the past two or three years. Institutions of higher education, which grew explosively during the 1960s, counted 307,000 students in 1983, a number that should begin to shrink by the end of the decade. Dutch universities still have more men than women: in 1983, 35 percent of all students were women, up from 25 percent in 1975.

LABOR FORCE AND INCOME

In 1983, the economically active population consisted of 3.8 million men and nearly 2 million women, or about 41 percent of the total population. Despite the bulge in the Dutch population of those in their productive years, this percentage is somewhat lower than in the United States (48 percent in 1982), due primarily to the smaller proportion of economically active women in the Netherlands (27 percent, compared to 40 percent in the U.S.). The Calvinist tradition of a woman's place in the home, as well as sharply decreased economic opportunities in recent years, conspire to keep women out of the labor force.

The Netherlands' 1960s labor shortage was over by 1970 when the country began to face increasing unemployment, aggravated by the mid-1970s recession. Dependent as it is on foreign trade, the Netherlands was severely hit by the international economic crisis and its concomitant downturn of export opportunities. Depending on the definition adopted, the overall unemployment rate ranged from 13.7 to 17.1 percent in 1983. The 15-to-24 age group accounted for a whopping 40 percent of all unemployed in 1983.

As elsewhere, the proportion of the economically active population in Dutch agriculture has diminished during the past half century. In 1930, it was still about 20 percent, but by 1983 primary activities provided employment for less than 2 percent of the working population. Nevertheless, agriculture produced 4 percent of the national income, whereas unprocessed agricultural products accounted for nearly 7 percent of all export earnings. Dutch dairy products, flowers and bulbs and horticulture are well known, but few associate chickens with Holland even though Dutch

TIPS ON TRENDS

TWO INTERNATIONAL RESEARCH COMPANIES JOIN

SRG International and NFO International have joined forces. The new company, called NFO/SRG International Ltd. and headquartered in North White Plains, New York, will be one of the largest international market research consultancies operating from the United States.

Jerry Stafford, who established SRG International in 1981, will serve as president of the new company. Joining the NFO/SRG International Board will be Dick Chay, currently NFO senior vice-president for marketing, and Alan Harvey, NFO senior vice-president for finance and strategic planning. Harvey formerly served as joint managing director of Research Surveys of Great Britain (RSGB).

NFO/SRG International Ltd. will use the resources of the AGB worldwide group of market research companies. AGB is among the world's five largest market research organizations.

HIGHER EDUCATION IN EUROPE

In 1980-81, in the countries of the European Community, 18.2 percent of young men aged 21 were enrolled in higher education. In 1970-71, only 15.8 percent of men that age were enrolled in college.

For 21-year-old women, only 9.3 percent were in college in 1970-71, whereas 13.4 percent were in college ten years later.

CONFERENCES

"Problem Solving in Industrial Marketing" and "Qualitative Methods of Research: A Matter of Interpretation," are two seminars that will be presented by the European Society for Opinion and Marketing Research in February. For further information, contact ESOMAR Central Secretariat, J.J. Viottastraat 29, 1071 JP Amsterdam, the Netherlands; telephone (020) 64.21.41. •

poultry production is one of the world's largest. The Netherlands also produces beef mostly through intensive agro-industrial forms of cattle rearing. In 1983, meat exports amounted to nearly $2 billion.

The manufacturing industry, predominantly developed after World War II, employs more workers than any other industry, with 24 percent of the working population. The main manufacturing sectors are food processing, chemicals, electronics, and oil refining. While the country imports crude oil ($9.06 billion in 1983), it exports $5.2 billion of upgraded oil products. Commerce, transportation, and finance together absorb another third of the work force.

Dutch incomes are for the most part equally distributed, highly taxed, and at low overall levels when compared to those of the United States. During the late 1960s and early 1970s, wages rose faster than productivity. Now in order to maintain a competitive advantage in the world export market, moderating incomes has become one of the principal economic policy goals of the government. The mean gross annual income of the economically active population amounted to 45,600 guilders in 1981, when the guilder was worth 40 cents (at present, it hovers around 30 cents). The mean net income in the same year amounted to 31,800 guilders, indicating a 30 percent proportion withheld in taxes and social security contributions.

In 1983, 38 percent of the wages of an average manufacturing worker who is the sole earner in a family of two children were withheld, one of the highest rates in the world, together with Denmark and Sweden. In the United States, a similar worker only paid about 22 percent of his gross income in taxes and social security. Mean annual household incomes in 1981 amounted to 49,200 guilders gross and 35,800 net.

In exchange for such heavy taxation, the Dutch worker receives a large number of social security benefits, ranging from guaranteed retirement, disability, and unemployment benefits to free medical and dental care, and subsidies for such basic needs as housing and public transportation. With a per capita expenditure of 2,000 guilders in 1981, the Netherlands has the world's fourth most expensive public health-care system, after Sweden, Denmark, and Norway.

Incomes after taxes vary little. While the median net annual household income was 32,800 guilders, the income range of the middle 50 percent income category was from 24,050 to 44,700 guilders. Much of the difference can be attributed to the gradual rise of income with age. In part, this relative equality is due to the progressive tax system and a guaranteed minimum income policy. The legal gross minimum

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"A PEOPLE OF MODEST TASTES AND FRUGAL HABITS, THE DUTCH TEND TO VALUE COLLECTIVE OVER PRIVATE CONSUMPTION."

□

wage for any person over age 23 was fixed at 2,048.80 guilders per month in 1983. For heads of households with dependents, the welfare system maintains this income in the event of unemployment. Unemployment benefits for one-person households are lower.

Now that the number of unemployed has grown to 800,000, keeping up with the demands of such a costly welfare system deeply troubles the Dutch government.

CONSUMPTION

A people of modest tastes and frugal habits, the Dutch tend to value collective over private consumption. They have been slow to adopt the stepped-up lifestyle of postwar economic success so wholly welcomed by their eastern neighbors, the Germans. While the Netherlands scores high on an indicator such as the number of telephones per 100 inhabitants (54 in 1982, the fourth highest among the major European countries), it trails behind countries like France or West Germany in terms of home or car ownership, or television sets per 100 inhabitants (0.31 in 1983). Bicycles outnumber cars. Each of the 4.2 million private cars covers an average 8,950 miles per year. Other consumer durables are more common; 98 percent of all households possess a refrigerator, 89 percent a washing machine (1983), and 80 percent a record player.

The Dutch eat lightly. Daily per capita calorie and meat consumption (in 1980, 3,338 calories and 185 grams) falls below that of the United States (3,652 and 304), Belgium (3,583 and 242), West Germany (3,537 and 220), and France (3,390 and 241), indicating a preference for vegetables and other light foods. According to a 1981 survey, the average Dutch household spent 20.8 percent of its budget on food, 18.5 percent on clothing, and 11.3 percent on transportation. Spending patterns of the different income groups varied only minimally.

Radio and television advertising, around only since 1967, seems timid by U.S. standards, being limited to five-minute intervals before and after the news. No cigarette commercials can be aired either on radio or television. Surprisingly, despite such restrictions, the Netherlands had the world's third highest per capita expenditure on advertising in 1980 ($187), following the U.S. ($241) and Switzerland ($202).

TRANSPORT AND COMMUNICATIONS

Its favorable location at the North Sea coast and in the middle of the Rhine delta make the Netherlands the "Gateway to Europe," and particularly to the industrial complex of the German Rhine-Ruhr area and Northeastern France. The Netherlands has by far the world's longest stretch of inland waterways per square mile of national territory. Dutch shipping companies account for about half of the cargo transport by water within the EEC. More than one-third of all U.S. imports pass through the port complex at Rotterdam, the largest of its kind in the world.

Although the quantity of independent printed media in the Netherlands is fairly large, advertising competition from radio and television has reduced their number in recent years. At present, 24 enterprises distribute a total of 84 daily newspapers, with a circulation of 4.7 million. Further competition comes from a variety of local newspapers and special advertising papers. Apart from newspapers, the Dutch publish about 4,000 journals and magazines.

SOURCES OF INFORMATION

Although no complete census has been published in recent years, statistical information on the Netherlands, both in Dutch and English, is abundant and easily obtained. The Central Bureau for statistics (CBS), located at 428 Prinses Beatrixlaan, POB 959, 2270 AZ Voorburg, telex 32692 CBS NI, publishes many statistical digests, some of which are in English. The most important is the *Statistical Yearbook of the Netherlands* (available for 67.50 guilders from the Staatsuitgeverij, Chr. Plantijnstraat, POB 20014, 2500 AE The Hague), of which a condensed pocket version in Dutch also exists. The *Jaarstatistiek van de Bevolking (Annual Population Statistics)* contains bilingual tables and summaries in English.

The Netherlands Inter-University Demographic Institute (NIDI), located at the same address as the CBS, regularly produces analyses of Dutch population trends. It publishes the monograph series *Population and Family in the Low Countries* in English, jointly with the Belgian CBGS.

The European Community Information Service, 2100 M Street NW, Suite 707, Washington, DC 20037 distributes *Basic Statistics of the Community*, which contains comparative statistics on the Netherlands and other European countries, especially economic data.

Business information can be obtained through the Netherlands' Chamber of Commerce for America, 1 Rockefeller Plaza, New York, NY 10020, phone (212) 265-6460. Among other things, it distributes the magazine *Netherlands American Trade*. Another relevant journal is *Holland Life: Business, Culture, and News Magazine of the Netherlands*, 255 Keizersgracht, 1016 EB Amsterdam. Radio Netherlands broadcasts in English from the Dutch Antilles. More specific market information is available from several sources. Summaries can be found in *World Sources of Market Information, Vol. 3: Europe*, by Euan Blauvelt and Jennifer Durlacher, published by Ballinger (1982) in collaboration with the Abcor Bank Group, or in *European Marketing Data and Statistics 1985*, published by Euromonitor Publications in London and distributed by the Gale Research Co. in Detroit. •

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PUBLICATIONS

Asia's New Industrial World: Will the East Win? by Michael Smith, Jane McLoughlin, Peter Large, and Rod Chapman, 1985, New York: Methuen, 136 pp., $6.95. Order from Methuen, 29 West 35th Street, New York, NY 10001.

Written by four reporters for the British newspaper, *The Guardian*, this book examines the growth and future of industry in Japan, South Korea, Singapore, and Indonesia. Although short, this book is packed with economic information without ignoring the social implications of changes driven by industrial growth.

In South Korea, for example, Jane McLoughlin writes that "there are indications that after industrialization will follow the moral and philosophical trends we have seen in America and Europe. Already, first sons, who traditionally take on the burden of the parents, are finding it harder than their younger brothers to find wives. Also, the still-small voice of women demanding equality and committing themselves to a career, rather than simply working in a factory until they marry and have children, may play some part in changing the old order."

While the reporters were sent to these Asian countries in part to assess the impact the countries will have in the 21st century, by the brief concluding chapter they agree that they cannot do more than pose a series of questions about the distant future. Events are moving so quickly, they say, that it is a real question whether the region will be an economic power center by 2001 or whether it will have achieved and passed its peak by then.

The authors do, however, find some common themes in the four nations:

—An emphasis on higher education.

—National planning based on consensus.

—The ability to manage constant change.

—A fierce national pride.

This book is highly recommended to anyone who is interested in Asian markets or involved in long-term planning for the markets in that region.

European Marketing Data and Statistics, 1985 Twenty-first edition. London: Euromonitor Publications, Ltd., 360 pp., $160. Order from Gale Research Co., Detroit, MI 48226.

This volume differs from its sister publication, *International Marketing Data and Statistics*, because it includes Pan-European profiles of the 30 countries covered. Each profile furnishes a map of the country broken into major marketing regions, a list of the largest towns, total population, languages, religions, president or head of state, prime minister or equivalent, and ruling party. Population data are also given for each marketing region and the important towns.

It is also useful to look at these volumes in series. For example, according to the 21st edition, the percentage of households in Austria with a refrigerator actually decreased between 1981 and 1983 from 93 percent of households in 1981 to 88 percent of households in 1983, while the percentage owning a dishwasher went up slightly — from 13 percent in 1981 to 15 percent in 1983. By looking at the prior edition, you could also learn that the consumption per capita of potatoes, honey, beef, pork, and poultry went down, but the consumption of fresh vegetables went up significantly, much as it has in the United States. •

COMING UP

Tunisia: The current government emphasizes education and encourages workers to seek jobs abroad.

Some developing countries look increasingly to the United States for higher education.

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compiled by Robert Kibbee

FEATURE

INFERTILITY IN DEVELOPING COUNTRIES

While attention is focused on how to decrease fertility among women in most developing countries, up to 40 percent of couples in some African countries are infertile.

The full extent of the problem is difficult to estimate because there is a stigma attached to infertility in many cultures, and couples are less likely to admit to this than to other medical conditions.

Infertility as a medical problem has evoked more sympathy than action. It is not a disease so its victims take up few hospital beds. Nor do they take days off from work so lost productivity is not a concern. The emphasis so far is more on preventing fertility than promoting it. Yet at the personal level, infertility does result in considerable suffering. And many couples are denied children when simple methods of public health could have helped prevent their condition.

In modernized countries, infertility is more visible because people expect to be able to plan and control their lives so they are more likely to look for a cause of the problem and seek help. Prospective parents also worry because the traditional solution of adopting a child is now more difficult to arrange.

The causes of fertility differ somewhat in rich and poor countries. Infertility in modern countries is caused primarily by hormonal disorders or by the misplaced growth of womb tissue on vital reproductive organs. Both are relatively easy to treat with drugs.

Far more common in developing countries, and far more difficult to treat, is infertility as the aftermath of infections, including sexually transmitted infections that can lead to tubal blockage and inflammation. These disrupt the transport of sperm and eggs, making fertilization impossible. Clinic reports from Nairobi, Kenya show that nearly three-quarters of women who are treated for infertility have tubal disorders and in Papua New Guinea the figure is as high as 86 percent.

The situation is compounded among men by their reluctance to admit to the problem. Clinic studies in Uganda and Nigeria show that men may have symptoms for more than two years before even seeking treatment for blocked tubes. The longer the condition goes untreated, the more difficult it is to reverse the effects.

On the basis of studies by the World Health Organization and the United Nations Fund for Population Activities, the most common culprit worldwide is almost certainly gonorrhea, and it is probably to blame for the high incidence in Africa where it may have become established at the time of the slave trade. In one Nairobi family planning clinic, nearly one in five women were found to have gonorrhea and in Cameroon, it affected 12 to 15 percent of women in maternity and child health centers.

Sexually transmitted diseases may be thought to have reached alarming levels in modern countries, but rates in the Third World can be greater because less treatment is available. In Sweden, for example, intensive control efforts have brought the gonorrhea rate down to fewer than 3 per 1,000, but similar improvements in developing regions have been difficult to achieve.

Apart from infections, the most important cause of infertility may be childbirth itself, together with illegal abortion — especially when carried out in unhygienic conditions and when women with complications cannot reach a hospital.

The prospects for treating the more serious cases of infertility are fairly bleak. The "high-tech" approaches such as in vitro fertilization and artificial insemination have received much publicity. But such techniques are too time-consuming, laborious, expensive, and uncertain for most couples to contemplate, even in developed countries. For couples in poor countries they are simply out of reach. Alternative approaches — hormonal treatments, for example — are likely to make advances over the next decade, but they do not at present boast much improvement over nature: a seven-year study of infertile couples in Canada showed that while 41 percent of patients receiving treatment did achieve pregnancy, so did 35 percent of those who were not treated.

Most couples depend on time-honored solutions such as finding someone else to bear a child for them. Surrogacy may have achieved some comparatively recent notoriety. Yet ever since Abraham's barren wife Sarah sent her husband to Hagar the handmaiden to bear them a child, women have for reasons of compassion or profit carried children on others' behalf. And adoption is still common in countries where a large number of women die in childbirth.

Prevention of infertility is likely to be more effective than a cure. Some forms cannot be prevented, but public-health programs can do much to eradicate sexually transmitted diseases. And improving obstetric care and stamping out illegal and aseptic abortion would help prevent some of the problems that occur in childbirth. •

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